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Ralston scrambles to boost cereals

By Julie Liesse

Ralston Purina Co. will try to regain its touch in the cereal market with the fall introduction of two licensed products.

Eager to find a winning formula, Ralston will introduce nationally Addams Family cereal and launch into Western markets WWF Superstars cereal.

Although Ralston has been one of the cereal market's success stories during the past two years, the company's future position depends on how far private-label products can penetrate the category and how well Ralston selects new licensed properties.

In the past year, it apparently hasn't chosen well. For the most recent four-week period, ended in mid-July, Ralston's pound share of the $7.2 billion cereal category was 4.2%, repre-

(Cont'd on Page 45)

Cross-media deals surge into cable

CNN-'USA Today' package leads swell

By Alison Fahey and Scott Donaton

New momentum for the cross-media trend is being generated by a wave of alliances between cable TV and publishers of magazines and newspapers.

Turner Broadcasting System's Cable News Network and Gannett Co.'s *USA Today* late last week announced their long-awaited agreement to produce a sports show.

Waiting in the wings: cable/-print partnerships involving *Newsweek* and MTV: Music Television, *McCall's* and USA Network, and the Weather Channel and *Skiing*.

Those alliances are either signed or close to completion, while other players like CNBC and Hachette Magazines are actively seeking partners to compete with vertically integrated media giants like Time Warner and Hearst Corp. The Family Channel said it's negotiating with "several women's service magazines, some related," about forming cross-media packages for advertisers in 1992.

The combination of print and cable TV is attractive to advertisers because both are narrowly targeted, highly flexible and relatively affordable media, industry experts agree.

"The demographic selectivity of magazines ties in very well with the demographic selectivity of cable," said David Verklin, senior VP-corporate media director at Hal Riney & Partners, San Francisco. "Magazines have presented themselves based on their ability to reach discrete demographic targets. That's the strategic and conceptual basis of these alliances."

CNN and *USA Today* last week

(Continued on Page 46)

LAST MINUTE NEWS

Nike matches Agassi, Julia Child

BEAVERTON, Ore.—Nike pairs tennis star Andre Agassi and chef Julia Child in a TV spot that breaks next week during the U.S. Open. In the "Bouncing TV" commercial, a TV set tuned to an Agassi match shakes, bounces and rolls with the force of the athlete's play. At one point, the channel even changes—to Ms. Child cooking artichokes. Wieden & Kennedy, Portland, is the agency.

McCann on tap for N.Y. state tourism

ALBANY, N.Y.—New York State Department of Economic Development is expected to award its $3 million tourism account to McCann-Erickson Worldwide, New York. The account since 1977 has been at Wells Rich Greene BDDP, creator of the "I Love N.Y." campaign.

PM smoking over 'Marlboro Man' film

NEW YORK—Philip Morris USA isn't ruling out the possibility of an advertising or promotional campaign to disavow any relationship between the company and MGM/-Pathe Entertainment's upcoming film, "Harley Davidson & the Marlboro Man." A Philip Morris spokeswoman said the company has sent three letters to the film studio expressing "outrage" about having its flagship brand name in the movie's title. She noted the company has no legal recourse

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INSIDE

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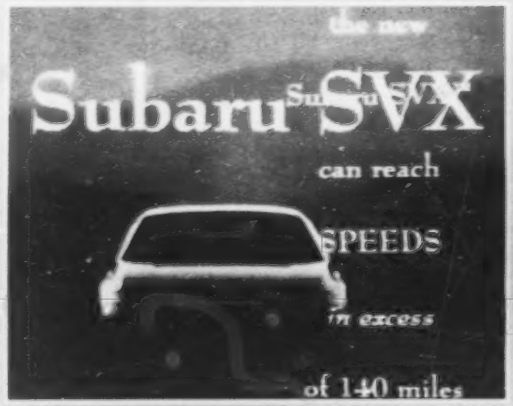
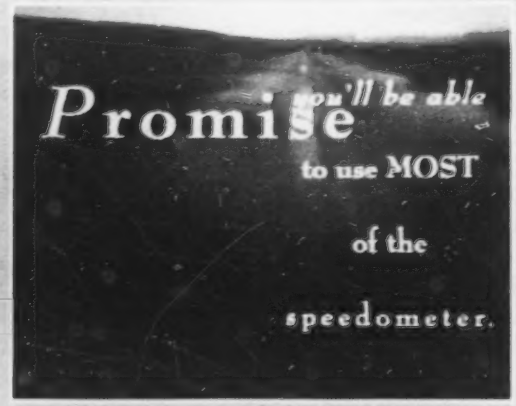
Top 200 Brands: McDonald's leaps past AT&T as top spender. **Page 14.**

Special Report: Rough ride for non-traditional media. **Page 27.**

Orion Pictures

Dennis Hopper





Commercials from Wieden & Kennedy for Subaru's SVX "promise you'll be able to use most of the speedometer."

Subaru overhauls image

By Bob Garfield

AD REVIEW

You manufacture a line of small, dull, utilitarian import cars with an image—if they've made any impression at all—of plodding practicality.

General Motors outspends you in advertising by a billion dollars-plus, Toyota by a factor of five. You've finally infused your products with modern design and performance, but you're still the automotive equivalent of sensible shoes. What do you do?

Think Big.

Thirty years ago, a dull and utilitarian import called Volkswagen, facing similar marketing obstacles, was able to Think Small—to ridicule the extravagance and impracticality of Detroit's stylish monsters mainly by making modest fun of itself. The unprepossessing little Beetle thus became a symbol of functional dignity for the sort of car buyer whose self-esteem didn't require tail fins and a 400 cubic-inch V-8.

That is precisely the positioning Subaru of America covets for 1992—with one important difference. The big boats are gone. The competition is nearly all solid and practical. The psychological appeal of self-possession and ridicule of conspicuous consumption are as valid as they ever were, but what

(Continued on Page 46)

Insurance group growls

By Raymond Serafin

Wieden & Kennedy's first major campaign for Subaru of America pokes fun at high-speed automotive ad cliches, but highway safety advocates aren't laughing.

Claiming the advertising promotes the reckless sort of driving that it parodies, the Insurance Institute for Highway Safety said it will ask officials of the importer and its Japanese parent company not to run the advertising scheduled to break late this month.

Charles Hurley, VP of the industry group, said the institute may ask the Federal Trade Commission and the U.S. surgeon general to get involved.

Wieden, based in Portland, Ore., is best known for its high-profile Nike advertising. The agency won

(Continued on Page 46)

NEWS SUMMARY

■ **Cable News Network** and *USA Today* will jointly produce a sports show, latest in a growing list of partnerships between cable companies and publishers. 1

■ **Subaru of America's** new ad campaign poking fun at high-speed automotive ad cliches has brought protests from highway safety advocates. 1

■ **Ralston Purina** will market two new licensed products, Addams Family cereal and WWF Superstars cereal. 1

■ **Delta Air Lines,** which will acquire key routes from Pan Am, plans a marketing campaign to position it as major global competitior to American and United. 3

■ **Battletoads,** a new videogame from Tradewinds, will be promoted on TV and elsewhere starting in late August. 3

■ **Hill & Knowlton** formed an executive committee to which CEO Robert Dilenschneider now reports. 3

■ **Hearst Corp.** and Dow Jones & Co. will begin a test next March of a new personal finance magazine, *SmartMoney.* 4

■ **U.S. ad spending** will drop 2.3% in real terms this year, forecasts Saatchi & Saatchi's media buying unit. 4

■ **Newspac,** a sample-carrying packet inserted in newspapers, is under test by the *Chicago Tribune.* 4

■ **Whittle Communications** is said to be considering $120 million in added support of its place-based TV systems. 4

■ **Revlon's** reorganization of its North American unit signals plans for broader distribution of its products. 12

■ **Hardware product** marketers expect growth in environmentally friendly products to help boost sales this year. 12

■ **Hiram Walker Group** will consolidate several of its units and plans to target a number of consumer segments. 12

■ **Media buying** doesn't always reflect ad executives' views of media effectiveness, a survey indicates. 13

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■ **Circulation gains** were reported by only 46 of the top 100 magazines for the first half of 1991. 25

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■ **Leonard Pearlstein,** a founder of Keye/Donna/Pearlstein, was named president of Lord, Dentsu & Partners. 36

■ **Cable TV sponsorship** today may also include funding of certain shows or series, ensuring advertisers a compatible environment for their commercials. 40

■ **BankAmerica's** takeover of Security Pacific Corp. may mean a short-term ad blitz but a lower combined budget. 41

■ **Stroh Brewery** will use humorous ads to back two new Old Milwaukee brand extensions. 41

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Flying with Pegasus

Huhndorf holds ad reins at Mazda luxury unit

By Cleveland Horton

When Mazda Motor of America takes the wraps off its new luxury division this week, it will also be focusing attention on the division's ad manager, Susan Huhndorf.

A Mazda task force looking into a second channel of distribution, code-named Pegasus, earlier this month selected Ms. Huhndorf to oversee the estimated $50 million account, for which an agency review is getting under way.

The new luxury line is slated for a 1995 introduction and will compete with Toyota Motor Sales USA's Lexus, Nissan Motor Corp. USA's Infiniti and American Honda Motor Co.'s Acura.

Ms. Huhndorf, 37, is undaunted by the task.

"I think it's a lot of fun getting involved with the introduction of a new division, especially in the luxury category," she told *Advertising Age.*

Ms. Huhndorf has spent her entire career at ad agencies. She began at Competitive Edge, Los Angeles, an agency specializing in car dealer and dealer-group accounts. She moved to Della Femina, McNamee to work on American Isuzu Motors for "a couple of years," before joining Keye/Donna/Pearlstein in 1984. She left about two years later for a short stint at Bozell and a year as an account supervisor at Chiat/Day/Mojo before returning to K/D/P in '88.

She was among the handful of K/D/P staffers who moved to Livingston & Keye this year when K/D/P folded. Most recently, she was VP-account director.

People who've worked with Ms. Huhndorf praise her strategic thinking and ability to lead.

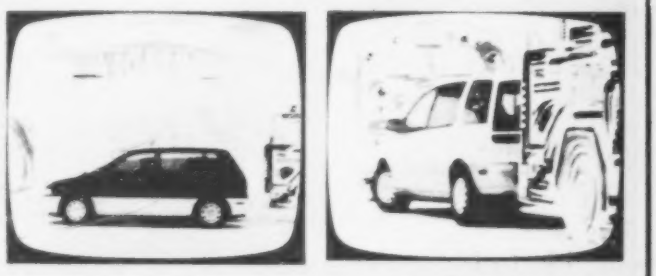
"She's a remarkable woman, very bright," said Paul Keye, chairman-executive creative director at Livingston & Keye. "She's a good leader."

Ms. Huhndorf assisted K/D/P in its original pitch for the American Suzuki Motor Corp. account, but once the agency won the account, she asked to work on other business. She ended up working on the California Department of Health Services' controversial anti-smoking account, among others.

Tom Patty, Chiat exec VP-account director, said: "She definitely has a thorough familiarity with and understanding of the car business." □

Mitsubishi makes Expo-nential leap

Mitsubishi Motor Sales of America introduces its Expo "sport wagons" today with TV spots on the West Coast. It's positioning the Expo as a vehicle fitting between station wagons and minivans. Grey Advertising, New York and Fountain Valley, Calif., handles.



P&G keeps attacking

By Jennifer Lawrence

Procter & Gamble Co.'s current new-products attack is moving ahead with a variety of brands, either moving into test or rolling nationally.

As many as six new entries are joining the recently disclosed Crest Complete toothbrush, Luvs Phases and Pampers Phases diapers, and Liquid Tide With Bleach Alternative (AA, Aug. 12).

Cinch, a combination glass/all-purpose cleaner that's been in test since last year, will be shipped to retailers nationally beginning today.

The product will get advertising from Jordan, McGrath, Case & Taylor, New York, themed "Don't clean it twice. Cinch it once."

Head & Shoulders 2-in-1 shampoo will be on store shelves in October. Like the successful Pert Plus, the product's "2-in-1" benefit offers a shampoo with conditioner. The product is rolling out without market testing. Ad support will be from Tatham/RSCG, Chicago.

Duncans Cups, a line of microwave bake-in-the-box package cupcake mixes, is expanding distribution from the East Coast to the West Coast markets starting today.

Test-market advertising from N W Ayer, New York, was themed "Oven baked. Not half baked."

Ivory Liquid, a clear dishwashing liquid in a clear bottle, is replacing the current white Ivory Liquid in Western test markets. TV advertising is themed "Now you can fight grease with your bare hands." Saatchi & Saatchi Advertising, New York, handles.

Ultra Downy fabric softener in liquid concentrate and refill versions have begun testing in Little Rock, Ark. Grey Advertising, New York, is the agency.

Also, Metamucil Sunrise Smooth will be available nationally this fall. The line extension of the leading bulk fiber laxative has been testing in Evansville, Ind., since last September with advertising themed "The grit is gone."

Tatham/RSCG, Chicago, is the agency. □

MasterCard multiplies

New retail partners join MasterValues promotion

By Gary Levin

NEW YORK—MasterCard International is adding six retail partners to its ongoing MasterValues program this fall in the company's most aggressive promotional campaign to date.

The move comes as MasterCard executives strongly denied persistent rumors of a strained relationship with agency Lintas:USA and maintained they don't plan to put the $45 million account up for grabs.

The latest installment of the MasterValues program, originally introduced last fall and reprised in the spring, will run from Oct. 15 to Dec. 24, supported by an estimated $10 million in radio spots, magazine ads and a five-week spot and cable TV campaign breaking Thanksgiving weekend.

That MasterCard effort will be challenged by primary competitors Visa USA and American Express Co.

In early October, Visa will start a contest offering its card users the chance to win one of several trips to the 1992 Winter Olympics in Albertville, France. Visa is a major sponsor of the Games.

The promotion will be "splashier" than a similar effort tied to the 1988 Games, said Visa spokesman Brad Hennig. Details are still being worked out, including the possible participation of retail merchants, he said.

BBDO Worldwide, New York, is creating a TV spot to promote the Winter Olympics giveaway.

AmEx plans a multimillion-dollar fourth-quarter ad campaign centered on a new retail promotion to drive card use. The company declined to give details but said advertising would prominently feature retail merchants.

Meanwhile, AmEx continues to run co-op ads for restaurants and hotels, and offers free trips and other prizes under its recently launched Membership Miles frequent-traveler program.

But MasterCard believes its program, which requires retail participants to post in-store sign-

(Continued on Page 45)

Hopper rides into commercials

After acting in and directing feature films since 1955, Hollywood rebel Dennis Hopper this year signed on with Los Angeles production company Gibson/Lefebvre/Gartner to direct TV commercials.

The 55-year-old director, best known for the 1969 counterculture classic film "Easy Rider," will be a featured speaker later this week at Advertising Age's *Marketing Forum '91. He talked last week with Reporter Marcy Magiera about advertising's influence on the movies and the movies' influence on advertising.*

Advertising Age: *TV commercials seem a surprising change of direction for someone with your rebellious, anti-establishment image. What aspects of commercial directing appeal to you?*

Mr. Hopper: I think that in a lot of aspects it's a more creative way of expressing yourself, even though I know it's very staid and there's a lot of people making decisions. The outcome is much more dramatic to me, and much more satisfying creatively. . . .

When I was doing "Easy Rider," and I did the cemetery scene with me taking the acid, most of those images that I used and the kind of editing style that I used I'd only seen in commercials and experimental filmmaking. . . .

I've always felt that the feature film was always a little behind. . . . People are used to seeing quick commercials and quick cuts and the production value of commercials. I think that's why our [movie] audiences have such a limited attention span right now, because of the quick sell of commercials.

AA: *What's the challenge?*

Mr. Hopper: [Commercial direction] would allow me to enter an area where I could experiment more and try things that you can't really do in features.

AA: *How different is the storytelling in commercials?*

Mr. Hopper: The one thing that bothers me in film, and I think it's everybody's nightmare in feature film, is that we have a linear story set up where we have to tell an external story and never get inside. In a novel, you can have a first-person experience because you can hear the person talking. . . . You can't do that in a feature film. But in a way, you do that in a commercial.

ONE ON ONE

AA: *How?*

Mr. Hopper: In a commercial, you can actually get into those areas visually. . . . The only way we can deal with it in feature film is narration.

I find narration really a cop-out most of the time. I think the closer we get to being able to explain ourselves visually without having to do it in narrative, the better off we are. . . .

Then you see your MTV music videos, which are also opening up an area of experimentation. And hopefully, eventually, all these things will seep back in a little later into feature filmmaking.

AA: *Are there any product categories you're especially interested in creating ads for? Or any products for which you wouldn't direct commercials?*

Mr. Hopper: I'm not really thinking of it that way. I could tell you things that I admire or that I think that are wonderful. I think the Xerox things, and . . . AT&T, a lot of those are really wonderful. . . .

I don't know who does them, but I'm sure they're top-of-the-line people. I think there's a Xerox copier ad with a child, an Oriental child, who's learning to walk. Then it goes into Michelangelo, they're repainting the Sistine Chapel. Then it goes through a variance of things that are just wonderful images.

AA: *Are there any commercial directors specifically whose work you admire?*

Mr. Hopper: I don't really know one from another. I only know when I see something that I like.

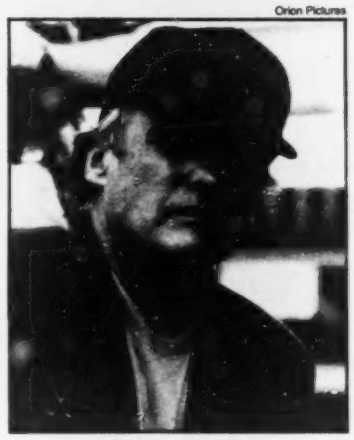
AA: *Are there any social or environmental causes in which advertising hasn't played a role yet where you think it could? Or are there any for which you'd like to do work?*

Mr. Hopper: You know, I see them on television. This egg is your brain being fried, or whatever it is. I think all those things are valid. We're a country that's a hard-sell country, so whatever we sell we should sell well, whether it's anti-drug [information] or it's [a message] about the environment.

AA: *Have you ever appeared in advertising?*

Mr. Hopper: I did one print thing years and years ago. John Huston and I did a thing for Jim Beam. I'd just directed "Easy Rider," and his first movie was "The Maltese Falcon," and they did a print ad saying: "There's no generation gap. Hopper just made 'Easy Rider' and John Huston's first film was 'The Maltese Falcon' and here they are arm-in-arm together drinking Jim Beam."

Orion Pictures



Dennis Hopper

The only reason I did that was because of John Huston.

AA: *Other feature film directors like Spike Lee and Leonard Nimoy have recently become involved in directing commercials. What do you think of the trend?*

Mr. Hopper: I think that's probably good. They've been doing it in Europe; this is nothing new in the industry, it's only new in this country.

We have such stigmas here, you know. "If they do commercials, they can't do features. If they do television, they can't do features." It goes on and on and on.

Your top cinematographers have certainly been doing commercials forever. Haskell Wexler, all of them, have been doing commercials. So I don't think there's any difference in directors coming in and doing commercials. I think it's good for the [advertising] industry.

AA: *Do you have any reservations about your ability to mesh with corporate America?*

Mr. Hopper: I've never had [experience with] it, so I wouldn't know. I've only heard nightmare stories. I'll have to do [a commercial] to find out, I guess.

AA: *Do you have any commercial projects set up yet?*

Mr. Hopper: No. I've lost a couple to people because I'd never done a commercial. I find that humorous.

AA: *Now that you're entering the advertising business, it seems appropriate to ask what you—as a movie director—think of the way movies are marketed.*

Mr. Hopper: Right now, it's very difficult to get a movie done unless you can go in and market it in a two-liner. They don't even read the script. [Studio executives ask,] "Well, what's it about? What category is it?" Then you've got to be able to explain what your film's about in two sentences or less and how they're going to market it, or they're not even going to read it.

AA: *Have you been involved in creating the commercials and trailers used in marketing your movies?*

Mr. Hopper: I've done them all, since the beginning, for all my movies. I've never been with anyone who hasn't encouraged me to do that. . . . I haven't ever bucked heads with anybody, except Universal Pictures at one point. [The studio] refused to distribute "The Last Movie" after I won the Venice Film Festival [in 1971] unless I re-edited it. I had final cut [authority] and refused to recut it, so it was never really distributed. . . .

It was my last movie for a long time. □

Exec views on media clash with plans

By Joe Mandese

The perceptions ad executives have about the effectiveness of different media don't match the reality of their media plans, a new study found.

The majority of advertiser and agency executives said network TV plays the greatest role in their overall marketing plans, but the same executives rated special-interest magazines and cable TV as the most effective media.

Of almost 500 ad executives responding to the 1991 Survey on Marketing Effectiveness & Media Value, 72% said broadcast network TV was "very/extremely" valuable to their plans. The survey was conducted by Myers Marketing & Research.

By comparison, 58% rated cable TV as "very/extremely" valuable, followed by special-interest magazines, 53%; radio, 39%; newspapers, 29%; and general-interest magazines, 23%.

When asked to rate each of those media on overall effectiveness and value, 47% said both cable and special-interest magazines performed the best, followed by broadcast TV, 43%; radio, 40%; general-interest magazines, 30%; and newspapers, 17%.

While the findings seem to support some ad executives' belief that agencies plan a disproportionate share of client media budgets around network TV, agency media executives disagreed.

"Effectiveness is a relative term. It really depends on what the client's marketing and communications goals are," said Richard Kostyra, exec VP-director of media services at J. Walter Thompson USA, New York.

George Hayes, senior VP-director of media planning of McCann-Erickson USA said: "If you're measuring effectiveness in terms of sales promotion, cable and special-interest magazines are head and shoulders above network. If you're measuring it in terms of reach, network beats them hands down."

Specific effectiveness responses to the survey support that view.

Asked to rate the "availability of marketing/promotional support," radio rated No. 1, followed by special-interest magazines, general-interest magazines, cable TV, network TV and newspapers.

But asked to rank effectiveness in "influencing consumer motivations," network TV ranked highest, followed by cable TV, special-interest magazines, radio, general-interest magazines and newspapers.

While McCann's Mr. Hayes said he believes network TV still is the most effective medium overall, he acknowledged a growing sentiment throughout the industry that its effectiveness is slipping.

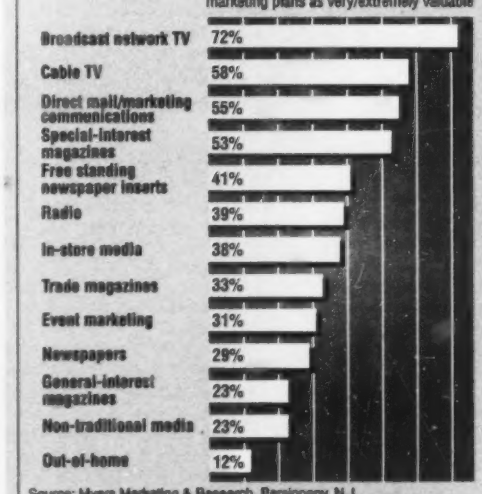
"There is a perception that network television has lost some of its effectiveness and there may be a feeling that there is too much reliance on the medium," he said. "But you'd be hard pressed to say that cable was actually more effective than network TV."

The mail survey was conducted in March and April among executives who serve on an ongoing panel. □

What's wrong with this picture?

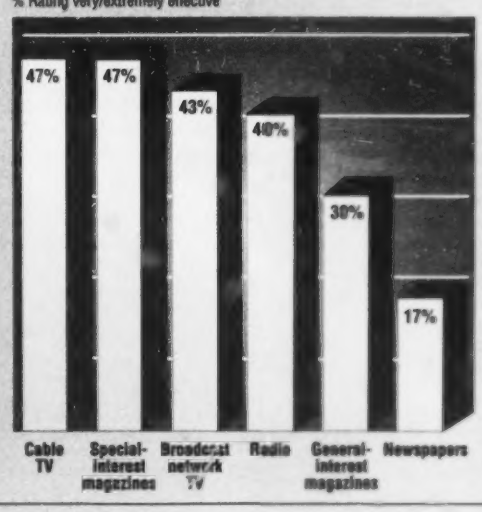
Broadcast networks still dominate national advertising plans...

% Rating the contribution of each medium to overall marketing plans as very/extremely valuable



...but cable TV and special-interest magazines lead media in overall effectiveness and value.

% Rating very/extremely effective



Source: Myers Marketing & Research, Parsippany, N.J.

KIMBERLY MART

Cutbacks at AT&T are enough to push McDonald's to the top in quarterly Ad Age survey

THE TOP 200 BRANDS

Top brands pull away from the pack

By R. Craig Endicott

If all advertisers followed the lead of the Top 200 brands, the media business might not be in its current mess.

While the rest of the nation's advertisers spent 15.5% less in first quarter 1991 vs. first quarter 1990, the Top 200 brands boosted their spending 6.2%. The showing was even more impressive in light of an anemic 0.5% increase among the Top 200 in fourth quarter 1990 vs. fourth quarter 1989.

Although the Top 200's $3.7 billion in collective spending accounted for 42.1% of all advertisers' media expenditures—up from 36.6% in first quarter 1990—the Top 200 couldn't shoulder the entire industry's burden.

Spending below the Top 200 turned stingy. Excluding the Top 200, advertising plunged 12% in magazines, 26% in newspapers, 15.6% in network TV and 13.1% in spot TV. The Top 200, however, cut back only network TV a minuscule 1% to $1.5 billion. The only media to fare well among brands below No. 200 were cable, up 1%, and national spot radio and syndicated TV, each up 15%.

AT&T cut its first-quarter 1991 expenditures 28.9%, to $67.5 million, from the same period in 1990, unseating it as the top-spending brand, a position it had held for four consecutive quarters, according to *Advertising Age's* Top 200 Brands listing *(see full chart on Page 18)*. The company reduced spending for Long Lines business and Long Lines overseas to $20.1 million, down 44% from first quarter 1990, according to LNA/Arbitron Multi-Media Service.

Heavy maintenance-level ad spending by McDonald's restaurants, which grew 1.5% from the year-earlier period to $95 million, moved it to the No. 1 spot as AT&T tumbled to No. 5.

Despite overall growth, the Top 200 are not recession-proof. Growth in first quarter 1991 was less dramatic than the year-earlier growth of 9.5% from first quarter 1989.

Several top categories among the 200 were marked by spending cuts: Retail (non-food) advertising dipped 19.6% among the 12 brands in the Top 200; airlines dropped 0.7%; beverages 8.7%; credit/financial services 17.2%; and telephone services 8.7%.

The auto category again carried the big load, accounting for 22% of all spending by the Top 200, same as in 1990. But unlike each of the four preceding quarters in which growth in ad spending by Japanese brands far outstripped U.S. counterparts, the first quarter saw Detroit come out swinging.

With 14 of the 29 brands in the category U.S. nameplates, Detroit pushed its spending to $458.7 million, up 17.2%. Ten Japanese brands totaled $284.1 million, down 4%.

The Ford brand rose from No. 6 a year ago among all brands to No. 2 by spending $89.7 million, up 37.1%. The big beneficiaries were Ford Escort at $14.3 million, up 232.6% from the prior-year period; Ford general promotion for cars and trucks, up 322.5% to $16.9 million, and Ford Crown Victoria, which went from nothing to $7 million, according to LNA/Arbitron.

Chevrolet spent $88.8 million, up 27.4%, vaulting it from No. 5 in first quarter 1990 to No. 3. Chevrolet backed Caprice with $10.9 million, up 131.9%, and funneled $19.8 million into general promotion for passenger cars and light trucks, up from only $500,000 in the prior-year period.

Network TV, the big auto medium, received 7.6% fewer dollars than in first quarter 1990 as auto advertising rose in magazines, spot TV and newspapers.

Network TV faired poorly among food advertisers, the second-largest category among the Top 200 at $374.8 million. Network spending dipped 14% as spot TV rose 32%, syndicated TV, 17.5%, and magazines, 5%.

Network TV performed best among the third- and sixth-largest Top 200 categories, rising 30% from the entertainment category and 11.5% from the drug category, which grew a remarkable 17.2% in all media to $193.4 million. Seasonal flu and cold remedies abounded in the category, led by No. 12 Tylenol at $44.3 million, up 28.2%.

The biggest-spending corporation, based on Top 200 brands, was General Motors Corp. Its $256.6 million spending among eight Top 200 brands represented a 19.9% increase. Philip Morris Cos. was second, backing 10 brands with $204.2 million, up 5.1%. PM's top finisher was No. 8 Kraft at $55.4 million, up 11.3%.

Ad totals in this report are for 10 media provided by LNA/Arbitron. A "brand" is a product or service marketed under the same name. A brand's ad total can cross LNA/Arbitron-designated subclasses, but brand ad totals include only amounts from those subclasses where spending exceeded $500,000. □

Top 10 parent cos. of brands in top 200

Rank	Company	Measured ad spending 1991	1990	% chg	Ad spending by media Print	Broadcast	Outdoor	Number of brands
1	General Motors Corp.	$256.6	$214.1	19.9	$73.4	$181.9	$1.3	8
2	Philip Morris Cos.	204.2	194.3	5.1	41.1	150.4	12.6	10
3	PepsiCo	122.9	113.9	7.9	2.0	120.4	0.6	4
4	Procter & Gamble Co.	120.7	125.6	(3.9)	17.4	103.0	0.3	11
5	Ford Motor Co.	108.4	76.1	42.5	29.8	78.4	0.2	2
6	McDonald's Corp.	95.0	93.6	1.5	1.0	92.6	1.4	1
7	Chrysler Corp.	93.8	101.3	(7.4)	26.7	67.0	0.0	4
8	Toyota Motor Corp.	90.2	81.7	10.4	25.9	63.9	0.4	2
9	Sears, Roebuck & Co.	87.7	112.9	(22.4)	19.4	68.3	0.0	3
10	Kellogg Co.	77.1	92.0	(16.2)	0.9	76.2	0.0	1

Notes: Dollars are in millions. Totals include only brands from within the top 200 in the first quarter of 1991. Source: LNA/Arbitron Multi-Media Service

Top 10 categories among top 200 brands in first quarter 1991

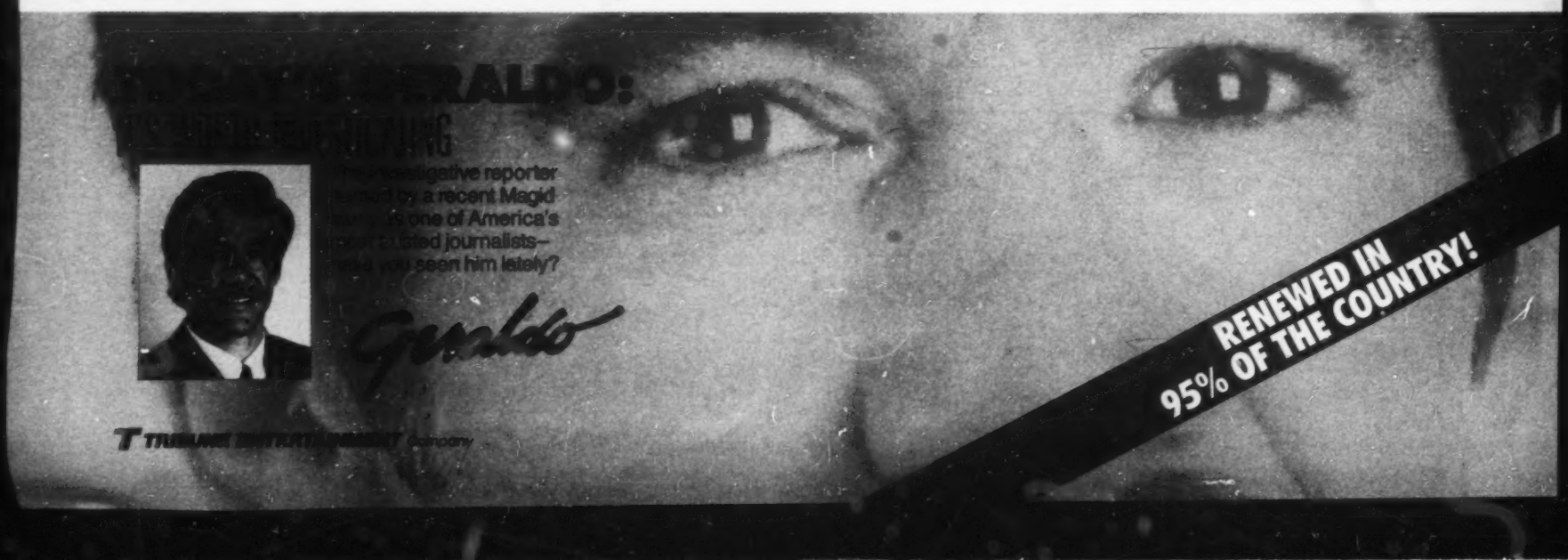
Rank	Category	Measured ad spending 1991	1990	% chg	Ad spending by media Print	Broadcast	Outdoor	Number of brands
1	Automotive	$812.8	$762.7	6.6	$232.1	$578.1	$2.7	29
2	Food	374.8	368.3	1.8	38.7	336.0	0.1	19
3	Entertainment & media	311.8	279.2	11.7	116.1	194.2	1.6	17
4	Restaurants	281.0	272.3	3.2	1.4	276.7	2.9	10
5	Retail (non-food)	207.3	257.9	(19.6)	107.2	100.0	0.2	12
6	Drugs	193.4	165.1	17.2	8.1	185.3	0.0	16
7	Beverages	171.6	187.8	(8.7)	9.2	161.6	0.8	9
8	Toiletries	165.2	146.7	12.6	47.7	117.6	0.0	14
9	Telephone services	128.4	140.6	(8.7)	13.1	114.9	0.4	5
10	Beer	104.7	103.0	1.7	4.5	98.7	1.5	3

Notes: Dollars are in millions. Totals include only brands from within the top 200 in first quarter 1991. Source: LNA/Arbitron Multi-Media Service.

Measured media spending in first quarter 1991

Rank	Media	Top 200 brands 1991	1990	% chg	All measured brands 1991	1990	% chg
1	Network TV	$1,515.9	$1,531.4	(1.0)	$2,396.3	$2,574.9	(7.0)
2	Spot TV	684.9	650.2	5.3	1,875.3	2,020.4	(7.2)
3	Magazine	473.6	435.1	8.9	1,377.1	1,464.2	(5.9)
4	Newspaper*	399.6	386.6	3.4	1,739.5	2,202.5	(21.0)
5	Syndicated TV	247.4	180.5	37.1	445.1	351.2	26.7
6	Cable TV networks	128.1	102.0	25.5	282.7	254.9	10.9
7	Network radio	87.6	61.8	41.8	189.6	174.2	8.9
8	National spot radio	63.9	52.8	21.2	217.7	186.4	16.8
9	Outdoor	44.7	32.5	37.5	150.6	150.3	0.2
	Subtotal print media	873.2	821.7	6.3	3,116.6	3,666.7	(15.0)
	Subtotal broadcast media	2,727.9	2,578.6	5.8	5,405.8	5,561.9	(2.8)
	Total	3,645.8	3,432.8	6.2	8,673.0	9,379.0	(7.5)

Notes: Dollars are in millions. * includes newspaper-distributed Sunday magazines. Source: LNA/Arbitron Multi-Media Service. AA charts: Kevin Brown



Top 200 mega-brands by first-quarter ad spending

Rank '91	Rank '90	Brand, product, service & parent company	Total measured ad spending 1991	1990	% chg
1	2	**McDonald's restaurants**, McDonald's Corp.	$94,959.3	$93,591.0	1.5
2	6	**Ford cars & trucks**, Ford Motor Co.	89,686.4	65,397.8	37.1
3	5	**Chevrolet cars & trucks**, General Motors Corp.	86,779.1	68,064.0	27.4
4	3	**Kellogg breakfast foods**, Kellogg Co.	77,138.6	91,999.2	(16.2)
5	1	**AT&T telephone svcs**, AT&T Co.	67,545.3	95,064.0	(28.9)
6	7	**Toyota cars & trucks**, Toyota Motor Corp.	66,201.1	61,126.4	8.3
7	4	**Sears stores**, Sears, Roebuck & Co.	62,882.6	85,638.7	(26.6)
8	10	**Kraft foods**, Philip Morris Cos.	55,426.2	49,810.5	11.3
9	18	**Oldsmobile cars & vans**, General Motors Corp.	47,378.6	34,832.7	36.0
10	11	**Pepsi beverages**, PepsiCo	46,271.3	49,116.6	(5.8)
11	8	**Nissan cars & trucks**, Nissan Motor Co.	44,603.1	56,132.9	(20.5)
12	19	**Tylenol remedies**, Johnson & Johnson	44,281.9	34,454.0	28.5
13	12	**Budweiser beers**, Anheuser-Busch Cos.	44,007.1	46,742.1	(5.9)
14	14	**Coca-Cola soft drinks**, Coca-Cola Co.	41,563.3	43,429.2	(4.3)
15	21	**Miller beers**, Philip Morris Cos.	41,506.9	32,679.2	27.0
16	16	**Honda cars, trucks, motorized products**, Honda Motor Co.	41,225.1	38,928.7	5.9
17	26	**Disney parks, movies, TV, video**, Walt Disney Co.	38,647.8	28,714.3	35.3
18	9	**American Express credit cards**, American Express Co.	37,282.4	50,602.1	(26.3)
19	20	**Dodge cars & trucks**, Chrysler Corp.	35,240.7	34,009.4	3.6
20	27	**Columbia movies, records, tapes, video**, Sony Corp.	34,332.1	28,000.2	22.6
21	34	**Nike shoes & apparel**, Nike Inc.	33,419.1	26,404.0	26.6
22	33	**Delta Air Lines**, Delta Air Lines	32,982.9	26,808.4	23.0
23	28	**Pizza Hut restaurants**, PepsiCo	32,719.0	27,831.8	17.6
24	13	**Chrysler cars**, Chrysler Corp.	32,510.6	45,950.0	(29.2)
25	17	**Burger King restaurants**, Grand Metropolitan	31,647.2	38,142.1	(17.0)
26	15	**Mazda cars & trucks**, Mazda Motor Corp.	30,437.0	40,635.5	(25.1)
27	42	**Universal City Studios**, Matsushita Electric Industrial Co.	29,434.5	22,874.1	28.7
28	91	**20th Century Fox videos & movies**, News Corp.	29,000.0	13,618.6	112.9
29	31	**American Airlines**, AMR Corp.	27,553.5	27,068.0	1.8
30	38	**Post cereals**, Philip Morris Cos.	27,054.6	25,266.2	7.1
31	25	**Buick cars**, General Motors Corp.	26,728.9	28,803.0	(7.2)
32	43	**Mercedes-Benz cars**, Daimler-Benz AG	26,388.0	22,090.9	19.5
33	29	**Warner Bros. movies**, Time Warner	25,341.1	28,706.7	(11.7)
34	50	**Kentucky Fried Chicken restaurants**, PepsiCo	25,581.6	20,727.8	23.9
35	40	**Time-Life books, records, videos**, Time Warner	25,553.0	23,627.9	8.1
36	60	**Acura cars**, Honda Motor Co.	24,424.6	18,179.9	34.3
37	53	**Lexus cars**, Toyota Motor Corp.	23,997.3	20,605.5	16.5
38	82	**Cadillac cars**, General Motors Corp.	23,436.6	14,806.5	58.3
39	95	**Hallmark cards**, Hallmark Cards	23,304.4	13,117.3	77.7
40	54	**Wrigley's gums**, Wm. Wrigley Jr. Co.	23,182.6	20,489.6	13.2
41	83	**MCI telephone svcs**, MCI Communications Co.	22,467.3	14,605.7	53.8
42	22	**Macy's stores**, R.H. Macy & Co.	22,379.0	30,833.2	(27.4)
43	48	**Nabisco foods**, RJR Nabisco	22,342.2	20,983.4	6.5
44	56	**General Motors cars**, General Motors Corp.	21,317.6	19,613.1	8.7
45	29	**United Airlines**, UAL Corp.	20,033.0	27,560.2	(27.3)
46	79	**Prudential insurance**, Prudential Insurance Co. of America	21,759.6	15,090.4	44.2
47	32	**Ultra Slim-Fast diet**, Thompson Medical Co.	21,473.3	26,900.8	(20.2)
48	35	**Campbell soups & foods**, Campbell Soup Co.	21,376.1	25,604.1	(16.5)
49	61	**Cheerios cereals**, General Mills	20,951.4	18,144.2	15.5
50	46	**Marlboro cigarettes**, Philip Morris Cos.	20,886.5	21,100.2	(1.0)
51	167	**Orion movies & video**, Orion Pictures Corp.	20,291.0	8,396.3	141.7
52	109	**L'Oreal cosmetics**, Nestle SA	20,133.3	11,680.7	72.4
53	230	**Hallmark Pictures story scenes**, Gateway Educational Products	2[illegible]1.2	264.2	7,504.9
54	51	**Kmart stores**, Kmart Corp.	20,053.8	20,642.8	(3.0)
55	78	**Axion-Nuliner remedies**, Sanofi SA	19,738.4	15,324.3	29.1
56	37	**Gillette shaving products**, Gillette Co.	19,574.7	25,305.8	(22.6)
57	74	**U.S. Sprint telephone svcs**, United Telecommunications	19,328.7	15,531.3	24.4
58	41	**Coors beers**, Adolph Coors Co.	19,213.8	23,530.9	(18.3)
59	30	**Folgers coffee**, Procter & Gamble Co.	19,193.0	27,284.9	(29.6)
60	77	**Circuit City stores**, Circuit City Stores	19,155.1	15,407.9	24.3
61	50	**U.S. dairy products**, U.S. dairy farmers	18,876.2	18,337.3	2.9
62	63	**Wendy's restaurants**, Wendy's International	18,765.7	17,846.4	5.2
63	119	**Mercury cars**, Ford Motor Co.	18,690.3	10,661.8	75.3
64	57	**J.C. Penney's stores**, J.C. Penney Co.	18,519.3	19,350.4	(4.3)
65	49	**Paramount movies & video**, Paramount Communications	18,515.4	20,966.8	(11.7)
66	88	**Franklin Mint**, American Protection Industries	18,513.3	14,156.9	30.8
67	47	**Domino's Pizza restaurants**, Dominos Pizza Inc.	18,481.9	21,046.8	(12.3)
68	68	**Taco Bell restaurants**, PepsiCo	18,246.3	16,219.4	12.5
69	139	**Purina pet foods**, Ralston Purina Co.	18,206.7	9,433.9	93.0
70	23	**Pontiac cars & trucks**, General Motors Corp.	18,086.1	29,901.7	(39.5)
71	94	**Isuzu cars & trucks**, Isuzu Motors	17,498.8	13,148.7	33.1
72	73	**United Parcel Service**, United Parcel Service of America	17,248.2	15,582.6	10.7
73	39	**Marlboro Medium cigs**, Philip Morris Cos.	16,853.7	24,879.3	(32.3)
74	65	**Advil & Coadvil remedies**, American Home Products Corp.	16,443.5	17,615.6	(6.7)
75	62	**Hyundai cars**, Hyundai Group	16,329.0	18,121.7	(9.9)
76	173	**Pillsbury foods**, Grand Metropolitan	16,235.1	8,160.9	98.9
77	98	**Tide laundry products**, Procter & Gamble Co.	16,078.1	12,671.2	26.9
78	150	**Hertz rent-a-car**, Park Ridge Corp.	16,034.2	8,896.5	80.2
79	64	**Chevrolet trucking & small svcs**, Citicorp	15,979.9	17,748.0	(10.0)
80	208	**Del Monte foods**, Del Monte Corp.	15,979.6	6,367.7	150.9
81	45	**Nissan cars**, Fuji Heavy Industries	15,291.8	21,260.9	(28.4)
82	NA	**Saturn cars**, General Motors Corp.	15,267.0	NA	NA
83	93	**Crest dent toothpaste**, Procter & Gamble Co.	14,951.3	13,172.3	13.5
84	75	**Allstate insurance**, Sears, Roebuck & Co.	14,766.2	15,471.6	(4.6)
85	106	**Little Caesar Pizza restaurants**, Little Caesar Enterprises	14,731.8	11,772.4	25.1
86	55	**Hershey candies & foods**, Hershey Foods Corp.	14,699.4	19,899.2	(26.1)
87	67	**Geo cars & trucks**, General Motors Corp.	14,594.4	16,458.1	(11.3)
88	108	**Lucky stores**, American Stores Co.	14,563.6	11,723.5	24.2
89	178	**Florida fruits & juices**, State of Florida	14,258.4	7,687.9	85.5
90	81	**Red Lobster restaurants**, General Mills	14,151.4	14,954.9	(5.4)
91	84	**May Co. stores**, May Department Stores Co.	13,823.9	14,584.4	(5.2)
92	168	**Vons Markets**, Vons Cos.	13,559.9	8,386.9	61.7
93	103	**Plymouth cars & trucks**, Chrysler Corp.	13,461.4	12,026.2	11.9
94	100	**HBO cable TV**, Time Warner	13,141.6	12,534.4	4.8
95	99	**Du Pont carpets, coatings, chemicals**, DuPont & Co.	12,897.5	12,582.1	2.5
96	171	**Reebok sporting footwear**, Reebok International	12,828.4	8,296.6	54.6
97	102	**Dr Pepper and Sprite**, Dr Pepper/Seven-Up Cos.	12,770.9	9,005.9	41.9
98	107	**Newport cigarettes**, Loews Corp.	12,744.6	11,734.4	8.6
99	96	**Royal Caribbean cruise line**, Royal Caribbean Cruise Line	12,728.1	14,207.8	(10.4)
100	161	**State Farm insurance**, State Farm Mutual Auto. Ins. Co.	12,580.7	8,493.5	48.1

Rank '91	Rank '90	Brand, product, service & parent company	Total measured ad spending 1991	1990	% chg
101	69	**Weight Watchers foods & diets**, H.J. Heinz Co.	12,558.2	15,807.3	(20.6)
102	141	**Jeep trucks & vans**, Chrysler Corp.	12,540.4	9,286.4	35.0
103	85	**Tri-Star movies**, Sony Corp.	12,382.9	14,354.0	(13.7)
104	265	**Winston cigarettes**, RJR Nabisco	12,293.0	4,071.7	201.9
105	NA	**Centrum diet drug mix**, American Cyanamid Co.	12,185.5	NA	NA
106	87	**Clairol hair products**, Bristol-Myers Squibb Co.	12,171.6	14,173.3	(14.1)
107	122	**Vaseline products, lotion & soaps products**, Unilever NV	11,978.9	10,559.2	13.4
108	175	**Neutrogena toiletries**, Neutrogena Corp.	11,964.0	7,879.7	51.8
109	193	**Johnsons products, waxes**, S.C. Johnson & Son	11,950.7	6,945.4	72.1
110	201	**Andersen doors & windows**, Andersen Corp.	11,837.5	6,691.2	76.9
111	195	**Continental Airlines**, Continental Airlines Holdings	11,825.0	6,902.6	71.3
112	70	**Mitsubishi cars**, Mitsubishi Motors Corp.	11,776.9	15,789.2	(25.4)
113	72	**Touchstone movies**, Walt Disney Co.	11,605.6	15,615.2	(25.7)
114	127	**Hardee's restaurants**, Imasco Ltd.	11,599.9	10,151.3	14.3
115	140	**Nestle foods**, Nestle SA	11,455.7	9,290.6	23.3
116	144	**Kleenex tissues & diapers**, Kimberly-Clark Corp.	11,322.0	9,120.4	24.1
117	100	**GTE telephone svcs**, GTE Corp.	11,157.5	8,411.2	32.7
118	177	**Excedrin remedies**, Bristol-Myers Squibb Co.	11,149.7	7,776.8	43.4
119	126	**Oil of Olay cosmetics**, Procter & Gamble Co.	11,096.8	10,150.3	9.3
120	183	**Federal Express cargo**, Federal Express Corp.	11,061.1	7,530.5	46.9
121	134	**Total cereal**, General Mills	10,958.1	9,726.5	12.7
122	112	**Midas Muffler shops**, Whitman Corp.	10,955.4	11,097.1	(1.3)
123	116	**Visa credit card svcs**, Visa International	10,911.8	10,808.8	1.0
124	125	**Betty Crocker foods**, General Mills	10,905.2	10,447.3	4.4
125	137	**Clorox cleaners**, Clorox Co.	10,902.3	9,390.8	16.1
126	52	**Montgomery Ward stores**, Montgomery Ward & Co.	10,838.8	20,618.5	(47.4)
127	44	**Stouffers food & hotels**, Nestle SA	10,582.2	21,750.6	(51.3)
128	142	**7UP beverages**, Dr Pepper/Seven-Up Cos.	10,557.8	9,269.2	13.9
129	128	**Lysol cleaners**, Eastman Kodak Co.	10,546.0	10,208.7	3.3
130	58	**Jell-O gelatins & puddings**, Philip Morris Cos.	10,443.3	18,355.6	(43.1)
131	264	**Johnson & Johnson products**, Johnson & Johnson	10,434.1	4,115.8	153.5
132	123	**Crest toothpaste**, Procter & Gamble Co.	10,320.2	10,530.2	(2.0)
133	115	**Tylenol remedies**, Sandoz Ltd.	10,292.0	10,975.3	(7.9)
134	104	**Head & Shoulders hair products**, Procter & Gamble Co.	10,110.6	11,821.5	(14.5)
135	105	**Discover credit card svcs**, Sears, Roebuck & Co.	10,028.5	11,804.6	(15.0)
136	192	**Lipton foods**, Unilever NV	9,993.6	7,044.4	41.9
137	221	**Ziploc food storage bags**, Dow Chemical Co.	9,830.9	5,826.8	68.7
138	130	**NBC TV**, General Electric Co.	9,816.3	10,013.0	(2.0)
139	226	**Bradford Exchange collectibles**, Bradford Exchange	9,815.4	5,660.0	73.4
140	184	**Upjohn drugs**, Upjohn Co.	9,734.6	7,527.4	29.3
141	181	**Keebler cookies & crackers**, United Biscuits (Holdings)	9,693.0	7,633.2	27.0
142	291-	**Kent cigarettes**, Loews Corp.	9,691.5	162.3	5,871.3
143	213	**Alamo rent-a-car**, Alamo Rent-a-Car Inc.	9,651.6	6,099.7	58.2
144	129	**Amtrak passenger rail system**, U.S. Government	9,489.1	10,140.3	(6.4)
145	145	**Holiday Inn hotels**, Bass PLC	9,436.8	9,115.3	3.5
146	36	**Volkswagen cars**, Volkswagen AG	9,366.3	25,374.6	(63.1)
147	146	**Estee Lauder toiletries**, Estee Lauder Inc.	9,365.0	9,061.5	3.3
148	135	**H&R Block tax svcs**, H&R Block Inc.	9,331.5	9,475.8	(1.5)
149	102	**Sports Illustrated magazine**, Time Warner	9,302.8	12,306.3	(24.4)
150	214	**Blue Cross & Blue Shield insurance**	9,290.4	6,092.8	52.5
151	132	**Maalox/Mylanta remedies**, American Home Products Corp.	9,241.7	9,827.6	(6.0)
152	170	**Carnival Cruise Lines**, Carnival Cruise Lines	9,222.8	8,334.4	10.7
153	109	**Volvo cars**, Volvo AB	9,115.2	7,177.7	27.0
154	71	**Pan Am airlines**, Pan American World Airways	9,001.6	15,680.0	(42.6)
155	110	**ABC TV**, Capital Cities/ABC	8,999.9	11,214.1	(19.7)
156	196	**Anacin remedies**, American Home Products Corp.	8,999.6	6,836.7	31.6
157	98	**Banana Republic catalogs**, Mast Inc.	8,952.3	6,458.8	38.6
158	101	**Goodyear tire svcs**, Goodyear Tire & Rubber Co.	8,946.9	12,489.9	(28.4)
159	138	**Bayer Lotion**, Miles Corp.	8,937.7	9,312.8	(4.0)
160	277	**Audi cars**, Volkswagen AG	8,805.9	2,589.8	240.0
161	268	**Mattel toys**, Mattel Inc.	8,791.8	4,338.8	102.6
162	205	**Dimetapp remedies**, American Home Products Corp.	8,673.6	6,550.4	32.4
163	131	**Infiniti cars**, Nissan Motor Co.	8,657.7	9,988.5	(13.3)
164	286	**Xerox electronics**, Xerox Corp.	8,638.9	513.9	1,581.0
165	92	**CBS TV**, CBS Inc.	8,585.0	13,332.7	(35.6)
166	96	**Broadway stores**, Carter Hawley Hale Stores	8,561.9	12,807.0	(33.1)
167	259	**Downy fabric softener**, Procter & Gamble Co.	8,555.7	4,257.5	101.0
168	180	**Tropicana juices**, Seagram Co.	8,485.5	7,646.4	11.0
169	133	**General Foods coffees**, Philip Morris Cos.	8,458.1	9,742.5	(13.2)
170	159	**IBM computers**, IBM Corp.	8,424.4	8,519.6	(1.1)
171	NA	**Listerine remedies**, Warner-Lambert Co.	8,409.9	NA	NA
172	113	**Nutri/System diet**, Nutri/System Inc.	8,[illegible]	11,036.2	(25.7)
173	224	**Blockbuster video stores**, Blockbuster Entertainment Corp.	8,[illegible]	5,725.7	42.8
174	232	**Ralph's food stores**, Ralph's Grocery Co.	8,[illegible]	5,441.2	49.9
175	266	**Maxwell House coffee**, Philip Morris Cos.	8,[illegible]	427.4	1,798.6
176	239	**Bayer aspirin**, Eastman Kodak Co.	8,061.0	5,200.9	55.0
177	240	**Publishers Clearing**, National Syndicate	8,060.1	4,815.3	67.4
178	114	**Pearle Vision Centers**, Grand Metropolitan	8,052.1	11,026.0	(27.0)
179	252	**Contac remedies**, SmithKline Beecham	7,966.7	4,603.8	73.0
180	124	**Virginia Slims cigarettes**, Philip Morris Cos.	7,919.7	10,448.4	(24.2)
181	194	**Public Service broadcast svcs**, Public Television Group	7,885.3	6,939.5	13.6
182	139	**Walgreen Drugstores**, Walgreen Co.	7,859.0	9,298.4	(15.5)
183	188	**Beef for Today Council**, Beef Industry Council	7,844.6	6,807.3	15.2
184	203	**Helene Curtis hair products**, Helene Curtis Industries	7,823.3	6,619.0	18.2
185	149	**Town Values stores**, Cotter & Co.	7,768.8	8,900.8	(12.7)
186	202	**Dristan remedies**, American Home Products Corp.	7,757.5	6,656.8	16.5
187	190	**Rave remedies**, Unilever NV	7,752.4	6,919.6	12.0
188	117	**Kroger stores**, Kroger Co.	7,735.3	10,837.3	(28.6)
189	191	**Softness toothpaste**, Colgate-Palmolive Co.	7,727.1	7,053.3	9.6
190	174	**Triaminic remedies**, Sandoz Ltd.	7,695.8	7,903.7	(2.6)
191	152	**Oxy 10 cleanser**, Procter & Gamble Co.	7,669.3	8,396.3	(8.7)
192	153	**Target stores**, Dayton Hudson Corp.	7,642.9	8,795.8	(13.1)
193	215	**Lucky Strike cigarettes**, Brown & Williamson	7,605.2	5,981.8	27.1
194	169	**Motrin IB pain remedies**, Upjohn Co.	7,588.6	8,347.0	(9.1)
195	253	**Benadryl remedies & antihistamine**, Pfizer & Gamble Co.	7,573.4	4,601.9	64.6
196	198	**Ivory soaps & cleaners**, Procter & Gamble Co.	7,561.2	6,775.3	11.6
197	76	**Bounty paper towels**, Procter & Gamble Co.	7,549.3	15,490.6	(51.3)
198	284	**Birds Eye foods**, Philip Morris Cos.	7,523.0	1,603.8	369.1
199	172	**New Line Cinema movies**, Time Warner	7,521.1	8,100.4	(7.1)
200	185	**Minute Maid beverages**, Coca-Cola Co.	7,390.4	7,492.1	(1.4)

Notes: Dollars are in thousands. Measured media spending includes magazine; Sunday magazine; newspaper; network, spot and syndicated TV; cable TV networks; national spot radio; and network radio. Source: LNA/Arbitron Multi-Media Service. See story on Page 14.

AA chart: Kevin Brown

Publishers pull in reins on circulation

By Ira Teinowitz

The recession and publishers' moves to drop so-called casual readers translated into first-half circulation declines, Audit Bureau of Circulations figures showed.

Donald Kummerfeld, president of the Magazine Publishers of America, said publishers responded to the recession by trimming circulation marketing.

"There is no doubt people are spending less on rate bases as part of their belt tightening. To some extent what you see is a planned decline because people are spending less on subscription acquisition," he said. "On the other hand, circulation response is better than it has been in a long time."

The figures were part of the audit bureau's FAS-FAX report comparing first-half circulation with the same period in 1990.

Only one of the nation's top 10 magazines grew during the first half. *Woman's Day* gained 3.2% to 4,751,977 amid heavy subscription promotion. The magazine added 862,501 subscriptions (a 155.6% increase), more than balancing a loss in single-copy sales.

In the top 20, the numbers were only slightly better. *Playboy* was up 1.8% to 3,498,802; also showing gains were *Newsweek*, up 6.0% to 3,420,167; *People*, up 1.9% to 3,235,120; *Prevention*, up 2.8% to 3,109,562; and *The American Legion Magazine*, up 4.4% to 2,984,389.

Of the top 100 magazines, 46 gained circulation, the audit bureau reported, though the size of losses tended to be larger than the gains.

Publishers noted two newsmagazines were among the titles with gains, and cited interest in the Persian Gulf War as a factor.

"It was just a very tough time," said Mike Boylan, vice chairman of the Enquirer/Star Group, which reported its *National Enquirer* and *Star* both declined in circulation and failed to meet their rate bases. "It was a combination of the war and the recession. My own habits changed tremendously during the war and my attention was diverted."

Newsweek's single-copy sales—while only a small part of the magazine's circulation—rose 25.2% to 222,094. *Time's* single-copy sales were up 25.8%, nearly overcoming efforts the magazine has taken in cutting back on subscription promotions. (*Time's* overall circulation dropped 0.2% to 4,248,565.) *U.S. News & World Report* saw its small single-copy sales grow 15.4%, but overall circulation rise 1.4% to 2,351,922.

One surprise in the report was the relative weakness of some sports magazines. *Sports Illustrated* reported circulation off 1.8% to 3,444,188 and *The Sporting News* said circulation fell 13.5% to 629,494. (Gannett Co. launched rival *Baseball Weekly* on April 5.) *Sport's* circulation fell 3.4% to 908,760.

Sports Illustrated, however, said its decline reflected an attempt to trim the bonus on its 3,150,000 rate base, rather than weakness in the category.

Inside Sports was up 4.5% to 692,304, and a few single-sport magazines did somewhat better.

Magazines with the biggest gains included *Life*, up 11.5% to 1,910,520; *Elle*, up 13.2% to 935,331; *Gourmet*, up 11.3% to 895,256; *Vanity Fair* up 8.7% to 813,881; *Endless Vacation*, up 9.2% to 811,256; *PC/Computing*, up 38.8% to 702,849; *Country America*, up 47.1% to 693,510; and *Sassy*, up 26.3% to 631,767.

Losers included both of Bauer Publishing Co.'s biggest magazines. *First for Women* dropped 13.4% to 2,392,722 while *Woman's World* dropped 11.6% to 1,363,992. The titles failed to meet their respective 2.5 million and 1.5 million rate bases. Among others, *Glamour* was off 9.0% to 2,012,305; *Penthouse* fell 10.3% to 1,501,821; *The Family Handyman* declined 13.9% to 1,150,662; and *Yankee* was down 10.3% to 903,954.

Penthouse's losses left the magazine 25% short of its 2 million rate base, since lowered. *National Enquirer's* 7.8% decline to 3,706,030 left it short of its 4 million rate base, and *Star's* fall of 11.3% to 3,207,951 was below that title's 3.5 million base.

The nation's biggest paid magazine, *Modern Maturity*, reported virtually no growth, a surprise considering its historic pattern of gains. The publication is included in the $5 membership fee for joining the American Association of Retired Persons.

Reader's Digest reported a slight drop with *TV Guide* and *National Geographic* reporting larger decreases. □

BPA's top circulations

Here's how the Business Publications Audit of Circulation's biggest magazines fared in circulation for the first half of 1991 compared with the same period in 1990. Magazines must have been published at least twice during the half year for inclusion.

Rank	Title	Circulation	% chg
1	Disney Channel Magazine	5,250,410	3.5
2	Friendly Exchange	5,101,341	8.3
3	American Baby's Healthy Kids		
	Age 4-10	2,005,058	0.0
	Age birth-3	1,504,938	0.0
4	U., The College Newspaper	1,319,141	(7.5)
5	Expecting	1,259,975	4.1
6	American Baby*	1,171,783	1.4
7	Baby Talk	1,167,417	10.8
8	Health Journal**	1,121,537	1.2
9	Chevy Outdoors	1,102,649	FA
10	Video Event**	1,097,392	FA
11	Fantastic Flyer	1,081,743	FA
12	Price Club Journal	1,061,763	21.3
13	Movies USA	1,[illegible]259	0.1
14	Sports Illustrated for Kids	874,969	3.2
15	PC Magazine**	810,389	6.2
16	Real Estate Today***	787,958	(1.1)
17	Realtor News***	782,683	(2.9)
18	Mickey Mouse Magazine***	718,809	(1.5)
19	Asia Magazine	677,958	(9.5)
20	Careers	601,725	0.1

FA – First audit. *Includes 181,521 paid circulation. **Fully paid. ***Mostly paid. Source: Business Publications Audit of Circulation

Consumer magazine circulation

Circulation of top magazines as reported to the Audit Bureau of Circulations. Figures are for the first half of 1991 as compared in percentage change with the same period in 1990 and are unaudited.

Rank	Publication	Circulation	% chg
1	Modern Maturity	22,450,000	0.0
2	Reader's Digest	16,306,007	(0.6)
3	TV Guide	15,353,982	(3.1)
4	National Geographic	9,921,479	(2.6)
5	Better Homes & Gardens	8,003,263	0.0
6	Family Circle	5,151,534	(0.2)
7	Good Housekeeping	5,028,151	(1.5)
8	McCall's	5,009,358	0.0
9	Ladies' Home Journal	5,002,900	(0.4)
10	Woman's Day	4,751,977	3.2
11	Time	4,248,565	(0.2)
12	Redbook	3,841,866	(2.7)
13	National Enquirer	3,706,030	(7.8)
14	Playboy	3,498,802	1.8
15	Sports Illustrated	3,444,188	(1.8)
16	Newsweek	3,420,167	6.0
17	People	3,235,120	1.9
18	Star	3,207,951	(11.3)
19	Prevention	3,109,562	2.8
20	American Legion Magazine	2,984,389	4.4
21	Cosmopolitan	2,679,356	(1.3)
22	AAA World	2,630,944	6.4
23	Scholastic Teen Network	2,591,130	(4.4)
24	First for Women	2,393,722	(13.4)
25	Southern Living	2,385,058	3.9
26	U.S. News & World Report	2,351,922	1.4
27	Smithsonian	2,204,298	(4.0)
28	Glamour	2,012,305	(9.0)
29	Field & Stream	2,003,041	(0.2)
30	NEA Today	1,980,823	3.4
31	Life	1,910,520	11.5
32	Home & Away	1,893,327	0.6
33	V.F.W. Magazine	1,885,461	1.3
34	Money	1,855,426	(5.3)
35	Ebony	1,836,039	(2.7)
36	Popular Science	1,823,032	0.1
37	Seventeen	1,815,521	6.6
38	Country Living	1,758,487	0.7
39	Parents Magazine	1,737,784	(0.8)
40	1,001 Home Ideas	1,675,243	1.3
41	Discovery	1,661,455	2.5
42	Popular Mechanics	1,638,015	0.3
43	Outdoor Life	1,503,691	(0.2)
44	Penthouse	1,501,821	(10.3)
45	Adventure Road	1,490,680	2.4
46	Soap Opera Digest	1,469,974	5.8
47	The Elks Magazine	1,434,170	(1.7)
48	Boys' Life	1,410,305	(1.7)
49	Golf Digest	1,408,055	3.8
50	Sunset	1,392,691	(0.7)
51	Woman's World	1,363,992	(11.6)
52	New Woman	1,336,639	(1.2)
53	Bon Appetit	1,331,853	(2.9)
54	The American Rifleman	1,329,806	(4.9)
55	US	1,328,442	0.1
56	Globe	1,300,379	(1.1)
57	Vogue	1,235,981	1.3
58	Rolling Stone	1,207,262	2.4
59	The American Hunter	1,205,791	(6.3)
60	Sesame Street Magazine	1,200,690	(5.6)
61	Teen	1,152,865	(0.9)
62	The Family Handyman	1,150,662	(13.9)
63	Self	1,140,928	(2.8)
64	Home Mechanix	1,136,419	(5.6)
65	Golf Magazine	1,126,738	6.4
66	Discover	1,125,357	2.8
67	Changing Times	1,116,437	(5.4)
68	The Workbasket	1,106,910	(10.9)
69	Mademoiselle	1,102,547	(1.5)
70	Travel & Leisure	1,100,651	(1.5)
71	Country Home	1,050,867	8.2
72	Business Week (World Wide)	1,009,415	(1.1)
73	Weight Watchers Magazine	1,006,396	0.4
74	Car & Driver	1,004,291	9.7
75	House Beautiful	1,001,732	7.4
76	Scouting	1,000,805	2.6
77	YM	995,764	(0.4)
78	Organic Gardening	995,265	(3.8)
79	Jet	971,752	4.3
80	Home	946,595	2.3
81	Elle	935,331	13.2
82	Sport	908,760	(3.4)
83	Yankee	903,954	(10.3)
84	Gourmet	895,256	11.3
85	Hot Rod	890,659	(1.6)
86	Motor Trend	887,475	5.3
87	Consumers Digest	874,226	1.8
88	American Legion Aux. Nat'l Ne	863,289	0.7
89	Nation's Business	859,929	0.2
90	Popular Photography	853,338	(14.8)
91	Essence	853,297	0.4
92	Working Woman	849,772	0.9
93	Victoria	836,835	5.8
94	Workbench	835,486	(5.3)
95	National Examiner	830,174	(7.0)
96	Vanity Fair	813,881	8.7
97	American Health	812,672	(6.8)
98	Endless Vacation	811,256	9.2
99	PC Magazine	810,388	6.2
100	Health	810,064	(3.7)
101	Fortune (Worldwide)	802,848	1.1
102	HomeOwner	788,232	1.3
103	Tennis	766,869	2.3
104	Omni	754,500	(18.4)
105	Practical Homeowner	751,077	0.0
106	Shape Magazine	750,655	3.3
107	Forbes	737,768	(0.5)
108	Road & Track	735,301	4.7
109	Weekly World News	730,329	(6.9)
110	Esquire	728,806	(1.5)
111	True Story	726,432	(25.5)
112	VFW Auxiliary Magazine	726,174	1.0
113	Traveler	724,226	(0.2)
114	Conde Nast Traveler	716,216	(5.4)
115	Harper's Bazaar	715,070	1.4
116	PC/Computing	702,849	38.8
117	GQ	700,644	4.0
118	Country America	693,510	47.1
119	Inside Sports	692,304	4.5
120	Working Mother	690,560	15.0
121	Midwest Living	689,028	13.8
122	Decorating Remodeling	668,438	8.2
123	Metropolitan Home	665,642	(5.1)
124	In Health	646,244	34.6
125	Inc.	640,259	0.0
126	Sassy	631,767	26.3
127	Parenting Magazine	631,246	11.1
128	Scientific American	629,563	(1.5)
129	The Sporting News	629,494	(13.5)
130	HG—House & Garden	628,560	1.4
131	Architectural Digest	625,727	(1.0)
132	Traditional Home	622,168	20.9
133	Muscle & Fitness	620,083	(0.5)
134	The New Yorker	615,260	(1.3)
135	Colonial Homes	597,860	3.0
136	Guns & Ammo	591,221	(6.6)
137	Catholic Digest	589,834	0.8
138	New Choices	575,363	(3.3)
139	Flower & Garden	568,586	(3.9)
140	Travel Holiday	567,664	2.5
141	The Rotarian	535,992	1.1
142	Bassmaster Magazine	531,347	(0.4)
143	Stereo Review	525,493	(13.8)
144	Golf Illustrated	519,894	11.4
145	Sierra	518,000	17.2
146	Natural History	515,097	(0.7)
147	Country Music	514,190	10.0
148	The Scottish Rite Journal	511,854	(3.8)
149	Financial World	508,916	1.7
150	Automobile Magazine	508,803	18.8
151	World Tennis	508,779	(0.6)
152	Sports Afield	508,692	(1.0)
153	Premiere	490,868	9.8
154	Byte Magazine	488,602	3.4
155	Pillsbury Classic Cookbooks	481,808	9.4
156	Audubon	470,954	5.2
157	Lear's	470,437	3.8
158	The Saturday Evening Post	470,072	(17.6)
159	The Atlantic	467,230	0.5
160	3-2-1 Contact	461,188	4.5
161	WWF Magazine	454,295	16.8
162	Video	451,055	5.5
163	Runner's World	446,602	1.9
164	Skiing Magazine	445,627	1.2
165	Town & Country	443,920	4.6
166	Ski Magazine	441,886	0.2
167	Car Craft	441,754	(3.2)
168	Insight	439,687	(5.1)
169	The Walking Magazine	431,635	1.8
170	Mirabella	427,199	20.8
171	New York Magazine	425,096	(2.8)
172	California City Group	416,547	(2.0)
173	Success	412,547	(9.4)
174	Game & Fish Magazine	402,245	6.9
175	Men's Health	393,887	61.6
176	Bicycling	386,331	0.2
177	Crafts	381,709	8.3
178	European Travel & Life	374,484	0.5
179	McCall's Needlework & Crafts	373,964	(26.8)
180	Capper's	373,415	(2.6)
181	Sun	370,012	(14.1)
182	Bride's	368,908	(13.3)
183	Satellite Orbit	363,670	10.6
184	Grit	362,853	(19.7)
185	Kentucky Living	362,054	4.3
186	Modern Bride	360,278	21.0
187	Easyriders	351,859	9.4
188	Video Review	350,844	(14.5)
189	Home Office Computing	350,238	(6.7)
190	Computer Shopper	345,765	5.9
191	Outside	345,642	6.3
192	Petersen's Hunting	345,580	2.8
193	Entrepreneur Magazine	342,447	3.1
194	Air & Space/Smithsonian	341,770	7.9
195	The Tennessee Magazine	337,739	4.9
196	MacUser	335,783	9.7
197	Carolina Country	334,603	0.4
198	Kid City Magazine	334,303	2.0
199	Longevity	331,165	17.0
200	Compute	328,306	37.6

Source: Audit Bureau of Circulations

NOTE

ONLY THE FOLLOWING PAGES OF THIS

PUBLICATION HAVE BEEN FILMED

Cov. 1, Pgs: 2, 3, 23, 33